

Financial Tree Maintenance Form Instructions

Financial Tree Maintenance

In an effort to increase the efficiency of adding new trees or tree values, a new financial tree maintenance form has been designed. This new form can be used for all financial trees and replaces all old tree forms.

To assist in creating new trees when one already exists, it may be helpful to refer to the OBD_019 query series. Since this query identifies values on the current tree, it may be easier to update this information than to create a new tree in its entirety. Also, printing a copy of the current tree report may help visualize the changes that need to be made (Go -> Process Financial Information -> Custom Budget Reports -> Tree Printing Report).

Below are instructions for completing the Financial Tree Maintenance form:

Name and Phone:

The person requesting the value(s) to be added to the tree should include their name and telephone number in cell (B2). This information is important if questions or verification of submitted request is required from the GTA Tree Maintenance group.

Business Unit:

Column A has been designated for the Business Unit.

Tree Name:

Column B is used to specify the tree where the value is to be added.

Values can be added to the default BCM_ORG, BCM_PROJECT, BCM_PROGRAM, RPT_ORG, RPT_PROJECT and RPT_PROGRAM trees. If necessary, RPT_ORG_PRG and RPT_PROJ_PRG trees can be created for Program Based Budgeting.

RPT (Report) trees can be created when an agency wishes to rollup reports differently than the BCM (Budget Checking Module) structure allows. In addition, when new default trees are created, trees indicating Prior Budget Years are recognized by adding the applicable Budget year to the end of the name, i.e., for Prior Budget Year 2003 - BCM_ORG2003, BCM_PROJECT2003 or BCM_PROGRAM2003 tree. This is necessary to allow transactions for Budget Year 2003 to process after the new (current) tree structure is in place.

Value to be added:

Column C is for the value (Child) being added. The Org, Program or Project chartfield value is entered in this column.

Financial Tree Maintenance Form Instructions

Level Name:

Column D is used to identify the level on the tree where the new value is to be added.

Parent:

Column E is used to indicate the parent of the new value. This is the roll-up level and must be one level higher than the child.

Always verify the values to be added are in PeopleSoft – Design Chartfields. Email the completed form to trees@gtg.ga.gov . Once Financial Systems has completed your request, review your tree to verify its accuracy.

If you have any questions about your financial trees, please contact the Financial Systems Help Desk at (404) 657-3956 or (888) 896-7771.

Human Resources Tree Maintenance

The HR tree maintenance form is located on the [Financial Systems](#) website and should be submitted to the HRMS Team via email to gtahrms@gtg.ga.gov If you have any questions, you can contact the Financial Systems Help Desk for HRMS at (404) 657-3956 or (888) 896-7771.